

Coupa Talk – Invoice Enhancements

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1. Invoice Example 1 – Small changes to take note off when creating an Invoice

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- Supplier template amended to allow fields to be changed e.g. invoice number, amount, VAT code.
- Automatic date removed - supplier will have to complete invoice date manually.

2. Invoice Example 2 – Dispute an Invoice

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- Editing Disputed Invoices - Allow AP teams to edit supplier invoices & Allow Suppliers to edit disputed invoices.
- Price Disputed Invoices - Supplier Template amended to allow AP to fix the price.
- Same invoice number can be used after credit note issued.
- Total Tax section no longer editable.

3. Invoice Example 3 – Abandon an Invoice

Slide 30- 44

- No need to Abandon so many invoices since Suppliers and AP Users can edit supplier invoices & disputed invoices respectively.
- Abandon Function allocated to AP users will reduce credit notes and save processing time.

Coupa Talk – Invoice Example 1

Small changes to take note off when creating an Invoice

Create an Invoice – No issue on PO Or Invoice

Test: What does Supplier see.

Test changes brought in:

- Supplier template amended to allow fields to be changed eg invoice number, amount, VAT code.
- Automatic date removed - supplier will have to complete invoice date manually.

Supplier Steps

2 As a Supplier, **Open** the **CSP Portal** and find the PO's that need to be invoiced under the **Order Tab**.

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Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer Samancor Chrome - ZZDELETE Jacques DIY

Purchase Orders

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the Action to Accept the Purchase Order and Create an Invoice using its data

Export to

View All Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
5000359401	03/24/25	Issued	None	6 Set of 60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C	No	2,235.06 ZAR		
5000359400	03/24/25	Issued	None	6 Set of 60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C	No	2,235.06 ZAR		
5000359399	03/24/25	Issued	None	6 Set of 60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C	No	2,235.06 ZAR		

1 Supplier has received a Purchase Order from Samancor.

The Items where delivered, the GRV and SES was completed.

The Supplier is ready to complete the Invoice in the Coupa Supplier Portal(CSP).

Supplier Steps

Samancor Steps

3 Open the 1st PO and Inspect. You will see the following information:

coupa supplier portal

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More...

Select Customer

Samancor Chrome - ZZDELETE Jac

Purchase Order #5000359401

General Info

Status

Issued - Sent via Email

Order Date

03/24/25

Revision Date

03/24/25

Requester

Erika Goosen (BIS Practitioner SAP Training)

Email

ERIKA.GOOSEN@SAMANCORCR.COM

Payment Term

Z048 old

Attachments

None

Acknowledged

☒

Assigned to

Select

Shipping

Ship-To Address

15 Upgrade street
15 Upgrade street2
San Mateo, 11111
United States
Location Code: 4530
Attn: Erika Goosen (BIS Practitioner SAP Training)

VAT ID

4680101393

Terms

CFR

Shipment Tracking

Add

No shipment tracking.

PO - Revise Warning



Warning - PO Revise

NO PO's may be revised if an
SES, GRV, Invoice is processed against it!
Training Greetings.

Take note of the warning message and ensure the SES has been completed before attempting to complete the invoice.

Supplier Steps

Samancor Steps

The following is visible when inspecting the PO Line.
4 Click on the **Create Invoice Button** to start the Invoice Process.

Lines

Advanced Search Sort by Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C	6	Set	372.51	2,235.06	0.00
Supplier Part Number		Supplier Auxiliary Part Number	Manufacturer Name		Manufacturer Part Number		
None		None	49672_None Supplied		None		

Per page 15 | 45 | 90

Total ZAR 2,235.06

4 Create Invoice Save Print View

0 Comments

Mute Comments

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment

Supplier Steps

Samancor Steps

The create invoice screen is visible.

Take note of the following:

- 1 Read the Blue message at the top.
- 2 Insert your companies invoice number
- 3 Enter the Invoice date – note the date no longer defaults to today's date.
- 4 Insert a copy of your company invoice in PDF format.

- Note – Invoice and Credit Note Numbers should not exceed 15 characters to prevent integration errors.

Create Invoice Create

1 Creating your first invoice? Just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold. X



General Info



From

2 * Invoice # INV 12Test ✓

3 * Invoice Date 03/24/25

Payment Term Z048 old

* Currency ZAR ▼

Status Draft

4 Image Scan Choose File Invoice 12Test.docx

Supplier Note

Attachments Add [File](#) | [URL](#) | [Text](#)

* Supplier ZZDELETE Jacques DIY

Supplier Tax ID ▼

* Invoice From Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

* Remit-To Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

* Ship From Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States



To

Customer Samancor Chrome

Buyer VAT ID 4680101393 ▼

Supplier Steps

Samancor Steps

Select the appropriate VAT code from the dropdown list provided. For most items you will select the 1st VAT line. Note the VAT amount will calculate automatically after you select the TAX code. Do not insert the VAT Value manually since this will result in an integration error.

Lines

Type

Description

Qty

UOM

Price

2,235.06

60218563 - FLTERIRO
UNT,SEDMENT,CARBON CTO,C

6.000

Set

372.51

PO Line

Service Sheet Line

Contract

Credit Line

5000359401-1

None

None

Supplier Part Number

Billing

620136-K-4601859100-4530 - 0001

Taxes

Tax Description

Tax Rate

Tax Amount

Tax Reference

0.000

0.00

ZA: H1 - 15% Input VAT - 15.0%

ZA: H2 - 15% Capital Input VAT - 15.0%

ZA: I0 - Exempt from Input VAT - 0.0%

ZA: I1 - 14% Input VAT - 14.0%

ZA: I2 - 14% Capital Input VAT - 14.0%

ZA: I3 - Zero Rated Input VAT - 0.0%

ZA: I4 - Non-claimable Input VAT - 0.0%

Totals & Taxes

Supplier Steps

Samancor Steps

- 1 Scroll down further - Click on the **Calculate Button** to calculate the TAX amount automatically.
- 2 Ensure that the attached Invoice document, and the **Total Amount** displayed below, correlate.
- 3 Then click on the **Submit Button**.

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
ZA: H1 - 15% Input VA	15.0	335.26	

+ Add Line
+ Pick lines from Contract

Totals & Taxes

Lines Net Total	2,235.06
Lines Tax Totals	335.26
Total Tax	335.26
Net Total	2,235.06
Total	2,570.32

1

3

Supplier Steps

Samancor Steps

- 1 The following message is displayed.
- 2 Click on the **Send Invoice Button**

Are You Ready to Send? 1

You're about to send an invoice to **Samancor Chrome** for a total amount of **2,570.32**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

Continue Editing

Send Invoice 2

- 3 The following green message is displayed.

Invoices

ZZDELETE Jacques DIY invoice #INV 12Test is processing 3

✔ Invoice submitted successfully. However - your customer requested an information update to ensure successful payment: Update

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Supplier Steps

Samancor Steps

Switching sides, Act as Neo (AP User Samancor) [Erika Goosen \(BIS Practitioner SAP Training\)](#) acting as NEO BISHOP

Open Coupa and find invoices in AP Hold. Select and Open one of the invoices. I will select invoice number INV12Test.

Requests

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Invoices

Return to classic experience

Views

MFC View

Create

Search

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions	PO Number	Invoice Date	Invoice Acknowledgement
INV10Test	ZZDELETE Jacques DIY	2025/05/24	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359399	2025/03/25	None
INV 11Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359400	2025/03/24	None
INV 12Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359401	2025/03/24	None

Supplier Steps

Samancor Steps

- 1 **Open Invoice** and inspect.
Invoice is Correct.
- Note the following :
- The invoice is not in Edit mode
 - If you click on Apply Tax code, the following message is displayed
- No new tax codes were applied.
- The **Dispute Button**
 - **Click on Edit Button.**

InvoicesCommunityInventorySourcingSuppliersContractsReportsSetup

Invoice InboxUninvoiced OrdersAccrual ReportInsightsLegal Invoice

Invoice #INV 12Test

[General Info](#)[Lines](#)[Total Taxes](#)[Comments](#)[Payments](#)[History](#)

Add Tag

General Info

Supplier ZZDELETE Jacques DIY (Active)

Invoice # INV 12Test

Invoice Date 2025/03/24

Payment Term Z048 old

Currency ZAR

Status AP Hold

Payment Due Date 2025/05/23

Supplier Note None

Attachments None

Image Scan

Invoice_12Test.pdf

Requester Erika Goosen (BIS Practitioner SAP Training)

Invoice PDF Document [download](#)

Invoice None

Acknowledgement

Bill To & Ship To

Chart of Accounts 4530 - Middelburg Ferrochrome via Order

Buyer VAT IDVAT 4680101393

Supplier Info

Remit-To ZZDELETE Jacques DIY 1 Test Benoni 1501 South Africa

Supplier Provided Remit-To Jacques DIY 25 Gemini Ave Benoni, 1501 United States

Invoice from Jacques DIY 25 Gemini Ave Benoni, 15 United States

Total2 570,32 ZAR

Edit

Apply Tax Codes

Dispute

Invoice #INV 12Test | ZZDELETE Jacques DIY | 2025/03/24

☐ Open next document

Supplier Steps

Samancor Steps

- 1 Action availability Buttons, at the bottom of the screen changes.
- 2 Select to change the **Tax Code** and the
- 3 **Total** goes blank until you click on the 4 **Calculate Button** again. Click on 5 **Submit**.
- 6 The invoice is approved

Invoice #INV 12Test is approved.

Taxes

Tax Code	Tax Rate	Tax Amount	Tax Reference	Tax Supply Date
ZA: H2 - 15% Capital In	15,0	335,26	Enter a tax reasor	yyyy/mm/dd

- ZA: H1 - 15% Input VAT - 15,0%
- ZA: H2 - 15% Capital Input VAT - 15,0%
- ZA: I0 - Exempt from Input VAT - 0,0%
- ZA: I1 - 14% Input VAT -

+ Pick lines from Contract

Total Taxes

Lines Net Total	Total	—, — ZAR
-----------------	-------	----------

- Calculate
- Cancel
- Save
- Dispute
- Submit

Supplier Steps

On the Supplier Side, once an invoice has been **Approved** no further actions are required and payment will be done as determined by the **Payment Terms**.

INV 12Test	03/24/25	Approved	5000359401	2,570.32	Yes
ZAR					

 coupa supplier portal

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Invoices Invoices Lines Payment Receipts Advanced

Select customer Samancor Chrome - ZZDELETE J ▾

Invoice #INV 12Test [Back](#)

 General Info

Invoice # INV 12Test
Invoice Date 03/23/25
Payment Term Z048 old
Currency ZAR
Status Approved
Shipping Term None

 Bill To & Ship To

Supplier ZZDELETE Jacques DIY
Invoice From Jacques DIY
25 Gemini Ave
Benoni, 1501
United States
Remit To Jacques DIY
25 Gemini Ave

Coupa Talk – Invoice Example 2

Dispute an Invoice

Create an Invoice – Over Invoiced. PO for Qty of 6 -GRV QTY of 5 - and Invoice Qty of 6 - Dispute – Supplier or AP can rectify and submit.

Test: What does Supplier & AP User see.

Test changes brought in:

- Editing Disputed Invoices - Allow AP teams to edit supplier invoices & Allow Suppliers to edit disputed invoices.
- Price Disputed Invoices - Supplier Template amended to allow AP to fix the price.
- Same invoice number can be used after credit note issued.
- Total Tax section no longer editable.

Supplier Steps

Samancor Steps

2 Second PO Invoiced followed same steps as in 1st Invoice.

Create Invoice

Create

Creating your first invoice? Just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold.

General Info

From

* Invoice # INV 11Test

* Supplier ZZDELETE Jacques DIY

* Invoice Date 03/24/25

Supplier Tax ID

Payment Term Z048 old

* Invoice From Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

* Currency ZAR

Status Draft

Image Scan Choose File Invoice 12Test.pdf

* Remit-To Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

Supplier Note

* Ship From Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

Attachments Add File | URL | Text

1 PO for Qty of 6 -GRV
QTY of 5 - and
Invoice Qty of 6 -
Dispute – Supplier or
AP can rectify and
submit.

Supplier Steps

Samancor Steps

- 1 Deliberately Over Invoice – Note, you cannot see on PO that you are busy with over invoicing.
- 2 Add tax and calculate and submit

Lines

Type	Description	Qty	UOM	Price	
	60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C	6.000	Set	372.51	2,235.06
PO Line	Service Sheet Line	Contract	Credit Line		
5000359400-1	None		None		
Supplier Part Number	Billing				
	620136-K-4601859100-4530 - 0001				
Taxes					
Tax Description	Tax Rate	Tax Amount	Tax Reference		
2 ZA: H1 - 15% Input VA	15.0	335.26			

Supplier Steps

Samancor Steps

- 1 Click on the **Calculate Button** to calculate the TAX amount automatically. Ensure that the attached Invoice document, and the **Total Amount** displayed below, correlate.
- 2 Then click on the **Submit Button**.

Tax Description	Tax Rate	Tax Amount	Tax Reference
ZA: H1 - 15% Input VA ▼	15.0	335.26	

[+ Add Line](#)
[+ Pick lines from Contract](#)

Totals & Taxes

Lines Net Total	2,235.06
Lines Tax Totals	0.00
Total Tax	0.00
Net Total	2,235.06
Total	2,235.06

[Delete](#)
[Cancel](#)
[Save as Draft](#)
[Calculate](#)
[Submit](#)

1

2

Supplier Steps

Samancor Steps

Receive message are you sure you want to send the Invoice; you select **Send Invoice Button**, and the following green message is displayed.

Invoices

ZZDELETE Jacques DIY invoice #INV 11Test is processing

As a supplier I can see on the **Invoice Tab** that two invoices has been processed – one with a **Pending Approval Status** (needs to be approved by Samancor) and one with a **Processing Status** (invoice needs a second before reflecting in Samancor system).

Create Invoices

- Create Invoice from PO
- Create Invoice from Contract
- Create Blank Invoice
- Create Credit Note

Export to		View		Search			
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
INV 11Test	03/24/25	Processing	5000359400	2,570.32 ZAR	No		
INV 12Test	03/24/25	Pending Approval	5000359401	2,570.32 ZAR	No		

Switching sides, Act as Neo (AP User Samancor) [Erika Goosen \(BIS Practitioner SAP Training\)](#) acting as NEO BISHOP

Open Coupa and find 3 invoices in AP Hold. Select INV11 Test.

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Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions	PO Number	Invoice Date	Invoice Acknowledgement
INV10Test	ZZDELETE Jacques DIY	2025/05/24	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359399	2025/03/25	None
INV 11Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359400	2025/03/24	None
INV 12Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359401	2025/03/24	None

Supplier Steps

Samancor Steps

1 Open Invoice and inspect. Scroll to the Line Item.

Note Samancor AP users can now also amend the quantity/ price/ tax code and invoice date if required. This will be verified during approval.

Although AP can fix the invoice quantity and price ,it is recommended that the invoice be disputed to allow the supplier to amend and attach the correct PDF invoice copy .

If fixed by AP this will result in audit issues as the attached PDF and processed invoice will not match.

1 line tags

1 Lines: Receipt missing

Type

Description

1

60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C

* Quantity

6

UOM

Set

* Price

372,51

2 235,06

PO Line

5000359400-1

Clear

Contract

Supplier Part Number

Commodity

Filtration Consumables_Filtration

Commodity Default Applied

Credit Line

None

Billing

Filtration, Purification and Flotation-K - Cost Centre-4601{x

via linked Order line

Period

2025 MFC

Taxes

Tax Code

Tax Rate

Tax Amount

Tax Reference

Tax Supply Date

15,0

335,26

Enter a tax reasor

yyyy/mm/dd

2

Receipt missing: Invoice line for 6.0 (0 credited) needs receipts of 1.0, PO (Rev 1) for 6.0 has current receipts of 5.0

Add Tag

+ Add Line

+ Pick lines from PO

+ Pick lines from Contract

Total

2 570,32 ZAR

Calculate

Cancel

Save

Dispute

Submit

Invoice #INV 11Test

ZZDELETE Jacques DIY

2025/03/24

☐ Open next document

Supplier Steps

Samancor Steps

- 2 The yellow message indicates that there is still a Receipt Missing.

Receipt missing: Invoice line for 6.0 (0 credited) needs receipts of 1.0, PO (Rev 1) for 6.0 has current receipts of 5.0

Lines

1 line tags

1 Lines: Receipt missing

Type	Description
1 	60218563 - FLTER,RO UN

PO Line

5000359400-1  Clear

- 3 When the computer mouse is hovered over the PO number in the basket line, it will indicate what was ordered received and invoiced. This is a case of over invoicing (quantity on invoice is for 6 items and we only received 5). This invoice will then be Disputed by Samancor.

3 Ordered 6.0 Set x 372,51 totalling 2 235,06 ZAR
Received 5.0 Set
Invoiced 0.0 Set totalling 0,00 ZAR

Match level: 3-way
Match level set by: Order Line

Supplier Steps

Samancor Steps

- 4 At the bottom of the Invoice, **Click** on the **red Dispute Button**.

- 5 The **Dispute Dialog box** is displayed.

- 6 Select the Dispute Reason most appropriate to the situation. In this case “Quantity does not match the quantity from PO, Contract or Catalogue”. You can scroll down for more options.

Supplier
Steps

Samancor Steps

- 7 Note the green Plus next to the Dispute Reason.
You can add more than one Dispute Reason to the dispute.
- 8 Once the Dispute Reason and Comment is completed, **Click on the Dispute Button.**

Dispute

×

Please provide an explanation for moving the invoice to disputed status. The dispute notification with reason and any comments you provide will be sent to the supplier email listed here and any additional emails you enter.

Supplier Email jpuchert@gmail.com

Additional recipients
jimmy.dough@acme.com, kathy.pie@acme.com

*** Dispute reason** Quantity does not match the quantity from PO, Contr + 7

Comments Over invoiced only, 5 items received

8

Cancel

Dispute

- 9 A green message is displayed confirming the Invoice has been Disputed.

Invoice #INV 11Test for ZZDELETE Jacques DIY has been disputed.

Supplier Steps

Samancor
Steps

Back as a Supplier, Open the CSP Portal and note the **Status** and **Dispute Reason** in the **Dispute Reason Column**. There is also a new Icon in the **Action Column** – the **Resolve Icon**.

INV 11Test	03/24/25	Disputed	5000359400	2,570.32 ZAR	Yes	Quantity different from PO/Contract or Catalog	
INV 12Test	03/24/25	Approved	5000359401	2,570.32 ZAR	Yes		

- Click on the **Resolve Icon**.
- The Invoice opens, and a clear description is given of **Void** and **Correct Invoice**.

Invoice #INV 11Test [Back](#)

Please review the invoice and determine the resolution option: 

4

Void
If this invoice was issued in duplicate or has been already paid for, you can Void this invoice from here.

Correct Invoice
If the disputed invoice has some incorrect detail, please choose this option to allow for an in place correction to the invoice.

Supplier Steps

Samancor Steps

At the bottom of the Invoice, are two Buttons- Void and Correct Invoice.

Void

Correct Invoice

Also take note of the comment at the bottom of the Invoice.
It corresponds with the Dispute Comments made by AP.

1 Comment

Mute Comments

Enter Comment

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Participants: Neo Bishop Boshielo (FA Specialist)

to supplier



Neo Bishop Boshielo (FA Specialist)

Over invoiced only, 5 items received

Payments

Dispute

Please provide an explanation for moving the invoice to disputed status. The dispute notification with reason and any comments you provide will be sent to the supplier email listed here and any additional emails you enter.

Supplier Email

jpuchert@gmail.com

Additional recipients

jimmy.dough@acme.com, katy.pie@acme.com

* Dispute reason

Quantity does not match the quantity from PO, Contr

Comments

Over invoiced only, 5 items received

Cancel

Dispute

Supplier Steps

Samancor Steps

1 Click on the Correct Invoice Button at the bottom of the invoice.



2 Scroll too the top of the Invoice.

3 A message in the Yellow line reminds you that you are busy with a correction that had been disputed.

4 However, you can use the same Invoice number. No need to add a number or a point 1 behind your invoice number anymore.

2 Invoice #INV 11Test [Edit](#)

Creating your first invoice? Just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold.

3 This invoice is a correction for [INV 11Test](#) that had been disputed.



General Info



From

* Invoice # INV 11Test 4

* Invoice Date 03/24/25

* Supplier ZZDELETE Jacques DIY

Supplier Tax ID

Supplier Steps

Samancor
Steps

- 1 Make the rectifications to the Invoice.
- 2 In this Case change the quantity from 6 to 5

Qty

5.000

to correspond with the delivery.

Lines

Type	Description	Qty	UOM	Price	
	60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C	6,000	Set	372.51	2,235.06

PO Line
5000359400-1

Service Sheet Line
None

Contract
▼

Credit Line
None

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
ZA: H1 - 15% Input VA	15.0	279.38	

+ Add Line

+ Pick lines from Contract

Totals & Taxes

Lines Net Total	2,235.06
Lines Tax Totals	335.26
Total Tax	335.26
Net Total	2,235.06
Total	2,570.32

Delete

Cancel

Save as Draft

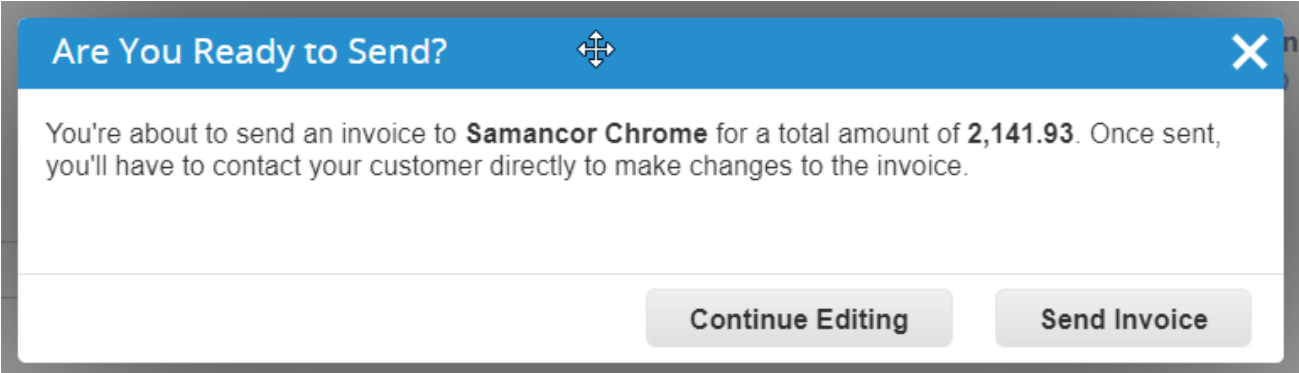
Calculate

Submit

Supplier Steps

Samancor
Steps

The Confirmation question is raised, and you can click on the Send Invoice Button.



A Message is displayed confirming the Invoice Processing.



Again, the invoice needs to be approved by the Samancor AP section.

Supplier Steps

Samancor
Steps

- 1 Interestingly, look what happens on the CSP side.
The Invoice that was Disputed, has automatically been **Voided**, and the new invoice(same invoice number) is in **Processing Status** for the same PO number.

Create Invoices

Create Invoice from PO

Create Invoice from Contract

Create Blank Invoice

Create Credit Note

Export to

View

All

Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
INV 11Test	03/24/25	Processing	5000359400	2,141.93 ZAR	No		
INV10Test	03/24/25	Abandoned	5000359399	2,570.32 ZAR	Yes	Duplicate Invoice. Already paid or payment review in progress.	
INV 11Test	03/24/25	Voided	5000359400	2,570.32 ZAR	Yes	Quantity different from PO/Contract or Catalog	
INV 12Test	03/24/25	Approved	5000359401	2,570.32 ZAR	Yes		

Coupa Talk – Invoice Example 3

Abandon an Invoice

Create Invoice Nr 3 – Abandon. PO for Qty of 6 -GRV QTY of 6 - and Invoice Qty of 6 – Abandon invoice – Supplier can resubmit invoice with same invoice number.

Test: What does Supplier & AP User see.

Test changes brought in:

- No need to Abandon so many invoices since Suppliers and AP Users can edit supplier invoices & disputed invoices respectively.
- Abandon Function allocated to AP users will reduce credit notes and save processing time.

Supplier Steps

- 2 Third PO Invoiced and followed the same steps as in the 1st two Invoices, except making use of the **Accept PO and Create Invoice Icon** in the **Action Column**.

 coupa supplier portal

JACQUES ▾ | NOTIFICATIONS 7

 Invoices **Orders** Business Profile Setup Service Sheets ASN Sourcing Forecasts Catalogs Community More.

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines More...

Select Customer

Samancor Chrome - ZZDELETE Jacqu

Purchase Orders

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

Export to ▾				View All ▾		Search 		
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
5000359401	03/24/25	Issued	03/24/25	6 Set of 60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C	No	2,235.06 ZAR		
5000359400	03/24/25	Issued	None	6 Set of 60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C	No	2,235.06 ZAR		
5000359399	03/24/25	Issued	None	6 Set of 60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C	No	2,235.06		
5000359392	02/18/25	Issued	None	1 Each of 60000233 - ANGI F IRON MII D	No			

Accept PO #5000359399 and Create Invoice

samancor 

Samancor Steps

- 1 PO for Qty of 6 -GRV
QTY of 6 - and
Invoice Qty of 6 –
Abandon invoice –
Supplier can
resubmit invoice
with same invoice
number.

Supplier Steps

Samancor Steps

Create Invoice.

Create Invoice Create

Creating your first invoice? Just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold.

General Info

From

* Invoice # INV10Test

* Supplier ZZDELETE Jacques DIY

* Invoice Date 03/25/25

Supplier Tax ID

Payment Term Z048 old

* Invoice From Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

* Currency ZAR

Status Draft

* Remit-To Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

Image Scan Choose File Invoice 12Test.pdf

Supplier Note

* Ship From Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

Attachments Add File | URL | Text

Supplier Steps

Samancor Steps

1

2

3

Add Tax and Calculate and Submit.

Taxes

Tax Description	Tax Rate	Tax Amount	Tax Reference
1 ZA: H1 - 15% Input VA	15.0	335.26	

+ Add Line

+ Pick lines from Contract

Totals & Taxes

Lines Net Total	2,235.06
Lines Tax Totals	335.26
Total Tax	335.26
Net Total	2,235.06
Total	2,570.32

2

3

Delete

Cancel

Save as Draft

Calculate

Submit

4 Receive below message, you select **Send Invoice**, and the following green message is displayed.

Are You Ready to Send?

X

You're about to send an invoice to **Samancor Chrome** for a total amount of **2,570.32**. Once sent, you'll have to contact your customer directly to make changes to the invoice.

4

Continue Editing

Send Invoice

5 ZZDELETE Jacques DIY invoice #INV10Test is processing

Switching sides, Act as Neo (AP User Samancor) [Erika Goosen \(BIS Practitioner SAP Training\)](#) acting as NEO BISHOP

Open Coupa and find a 3rd invoices in AP Hold.

Requests Orders **Invoices** Community Inventory Sourcing Suppliers Contracts Reports Setup

[Invoices](#) Invoice Lines Invoice Inbox Uninvoiced Orders Accrual Report Insights Legal Invoice

Invoices

Return to classic experience

Views MFC View

Create

Search

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions	PO Number	Invoice Date	Invoice Acknowledgement
INV10Test	ZZDELETE Jacques DIY	2025/05/24	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359399	2025/03/25	None
INV 11Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359400	2025/03/24	None
INV 12Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359401	2025/03/24	None

- 1 **Open Invoice** and inspect and find that this is a Duplicate Invoice (the other invoice was already processed). This invoice needs to be **Abandoned**.

Invoice #INV10Test

[General Info](#) [Lines](#) [Total Taxes](#) [Comments](#) [Payments](#) [History](#)



General Info

Supplier ZZDELETE Jacques DIY (Active)

Invoice # INV10Test

Invoice Date 2025/03/25

Payment Term Z048 old

Currency ZAR

Status AP Hold

Payment Due Date 2025/05/24

Supplier Note None

Attachments None

Image Scan



A_Attachment.pdf



Requester Erika Goosen (BIS Practitioner SAP Training)

Invoice PDF Document [download](#)

Invoice None

Acknowledgement

Integration failure None
reason

Blocked for Posting None



Bill To & Ship To

Chart of Accounts 4530 - Middelburg Ferrochrome
via Order

Buyer VAT IDVAT 4680101393



Supplier Info

Remit-To ZZDELETE Jacques DIY
1

Test

Benoni

1501

South Africa

Supplier Provided Jacques DIY

Remit-To 25 Gemini Ave
Benoni, 1501
United States

Invoice from Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

Ship from Jacques DIY
25 Gemini Ave
Benoni, 1501

- 2
- Click on the **Dispute Button**.

Important: Before abandoning an invoice, you must first dispute it.

Only after disputing the invoice can, you proceed to abandon it.

Lines

Line Level Taxation

Type

Description

Quantity

UOM

Price

1

60218563 - FLTER,RO UNT,SEDIMENT,CARBON CTO,C

6

Set

372,51

2 235,06

PO Line

5000359399-1

Clear

Contract

Supplier Part Number

Commodity

Filtration Consumables_Filtration

Commodity Default Applied

Credit Line

None

Billing

Filtration, Purification and Flotation-K - Cost Centre-4601fx

via linked Order line

Period

2025 MFC

Taxes

Tax Code	Tax Rate	Tax Amount	Tax Reference	Tax Supply Date
	15,0	335,26	Enter a tax reasor	yyyy/mm/dd

Total

2 570,32 ZAR

Calculate

Cancel

Save

Dispute

Submit

Invoice #INV10Test

ZZDELETE Jacques DIY

2025/03/25

2

open next document

Supplier Steps

Samancor Steps

3 Select the **Dispute Reason** most appropriate as indicated below, with a **4** **Comment** and **5** Click on the **Dispute Button**.

Dispute

Please provide an explanation for moving the invoice to disputed status. The dispute notification with reason and any comments you provide will be sent to the supplier email listed here and any additional emails you enter.

Supplier Email jpuchert@gmail.com

Additional recipients

jimmy.dough@acme.com, katy.pie@acme.com

3 * **Dispute reason** Duplicate Invoice. Already paid or payment review in

4 **Comments**

5

6 A message will be displayed confirming the **Invoice is Disputed**.

Invoice #INV10Test for ZZDELETE Jacques DIY has been disputed.

Supplier Steps

Samancor Steps

- 7 Back on the Invoice screen the **Status** of the Invoice is **Disputed**.
- 8 **Open** the Invoice again by **Clicking** on the **Invoice Number**.

Invoices

Return to classic experience

ViewsMFC View

Create

Search

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions	PO Number	Invoice Date	Invoice Acknowledgement
8 INV10Test	ZZDELETE Jacques DIY	2025/05/24	2 570,32 ZAR	Disputed	Coupa Supplier Portal		5000359399	2025/03/25	None

Now you have the option to either **Withdraw Dispute** (Cancel the Dispute) or to **Abandon** the Invoice.

9 Click on the **Abandon Button**.

Invoice #INV10Test

General Info

Lines

Total Taxes

Comments (1)

Payments

History

This invoice is locked for editing by you (cancel and unlock)

Add Tag

General Info

Supplier

ZZDELETE Jacques DIY (Active)

Invoice #

INV10Test

Invoice Date

2025/03/25

Payment Term

Z048 old

Currency

ZAR

Status

Disputed

Payment Due Date

2025/05/24

Dispute Reason(s)

Duplicate Invoice. Already paid or payment review in progress.

Dispute Method

Manual

Supplier Note

None

Attachments

None

Image Scan

A Attachment.pdf

Bill To & Ship To

Chart of Accounts

4530 - Middelburg Ferrochrome via Order

Buyer VAT ID/VAT

4680101303

Supplier Info

Remit-To

ZZDELETE Jacques DIY
1
Test
Benoni
1501
South Africa

Supplier Provided

Jacques DIY

Remit-To

25 Gemini Ave
Benoni, 1501
United States

Invoice from

Jacques DIY
25 Gemini

Total

2 570,32 ZAR

Withdraw Dispute

Abandon

9

Invoice #INV10Test | ZZDELETE Jacques DIY | 2025/03/25

☐ Open next document

Supplier
Steps

Samancor Steps

10

Just like the Dispute, an **Abandon Dialogue Box** appears. Complete the information required in the Dialogue Box. What is the **Abandon Reason** (Select from the dropdown) and a **Comment**. Click on the **Red Abandon Button**.

Abandon

Changing the status to abandoned won't void this invoice for tax purposes or allow the supplier to resolve it using Coupa. You won't be able to process it further and it will be blocked from payment.

Select a reason for abandoning this invoice and provide a comment. We'll send a notification with your reason and comments to the supplier email address listed here and any additional recipients you specify.

Supplier Email

jpuchert@gmail.com

☒ Send notification to the above supplier email address

Additional recipients

erika.goosen@samancorcr.com

jimmy.dough@acme.com, katy.pie@acme.com

Abandon Reason

Invoices processed incorrectly

Comments

Duplicate Invoice

Cancel

Abandon

A green message will be displayed , indicating that the invoice was successfully Abandoned.
Abandoned invoices will not integrate to SAP.
Only invoices with a Status of On Hold , AP Hold, Pending Receipt & Pending Approval can be Abandoned. Once an Invoice is approved it cannot be Abandoned. It can only be corrected with a Credit Note.

Invoices

[Return to classic experience](#)

Invoice INV10Test for ZZDELETE Jacques DIY is successfully abandoned.

Views

MFC View

Create

Search

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions	PO Number	Invoice Date	Invoice Acknowledgement
INV10Test	ZZDELETE Jacques DIY	2025/05/24	2 570,32 ZAR	Abandoned	Coupa Supplier Portal		5000359399	2025/03/25	None

Supplier Steps

Samancor Steps

Back as the Supplier in the **CSP Portal**.
Note the **Status** of the Invoice and the **Dispute Reason** in the **Dispute Reason Column**. It Corresponds with the Abandon Reason completed by Samancor.

 coupa supplier portal

JACQUES | NOTIFICATIONS

 Invoices Orders Business Profile Setup Service Sheets ASN Sourcing Forecasts Catalogs Community

Invoices Invoices Lines Payment Receipts Advanced

Select customer Samancor Chron

Invoices

Instructions From Customer

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page}

Create Invoices 

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to

View All

Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason
INV10Test	03/24/25	Abandoned	5000359399	2,570.32 ZAR	Yes	Duplicate Invoice. Already paid or payment review in progress.
INV 11Test	03/24/25	Disputed	5000359400	2,570.32 ZAR	Yes	Quantity different from PO/Contract or Catalog
INV 12Test	03/24/25	Approved	5000359401	2,570.32 ZAR	Yes	

Abandon

Changing the status to abandoned won't void this invoice for tax purposes or allow the supplier to resolve it using Coupa. You won't be able to process it further and it will be blocked from payment.

Select a reason for abandoning this invoice and provide a comment. We'll send a notification with your reason and comments to the supplier email address listed here and any additional recipients you specify.

Supplier Email jpuchert@gmail.com

☒ Send notification to the above supplier email address

Additional recipients erika.goosen@samancorcr.com
jimmy.dough@acme.com, kathy.pie@acme.com

Abandon Reason Invoices processed incorrectly

Comments Duplicate Invoice

Cancel

Abandon

Supplier Steps

Samancor
Steps

- 1 Important - once an invoice is Abandoned you will not be able to use the invoice again.
- 1 You can, however, create a new invoice with the same Invoice number as the abandoned invoice as indicated below.

Invoices

Views

All

Create

Match Conditions

Match all conditions

Filter By

PO Number

Clause

is

Value

5000359399

Invoice #	Supplier	Net Due Date	Total	Status
Inv10Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold
INV10Test	ZZDELETE Jacques DIY	2025/05/24	2 570,32 ZAR	Abandoned

Supplier Steps

Samancor
Steps

1 This is also a good time to look at the **Notification Setting** at the top of your page.

JACQUES | NOTIFICATIONS 14 | HELP

[Home](#) [Invoices](#) [Orders](#) [Business Profile](#) [Setup](#) [Service Sheets](#) [ASN](#) [Sourcing](#) [Forecasts](#) [Catalogs](#) [Community](#) [More...](#)

My Notifications

View All

1

2

3

4

5

☐	Message	Received
☐	Invoice INV10Test for 2,235.06 ZAR has been abandoned by Samancor Chrome - ZZDELETE Jacques DIY.	03/24/25 11:51 AM
☐	New comment from Samancor Chrome - ZZDELETE Jacques DIY on Invoice INV10Test	03/24/25 11:51 AM
☐	Invoice INV10Test for 2,235.06 ZAR has been disputed by Samancor Chrome - ZZDELETE Jacques DIY.	03/24/25 11:47 AM
☐	New comment from Samancor Chrome - ZZDELETE Jacques DIY on Invoice INV10Test	03/24/25 11:47 AM
☐	Invoice INV 11Test for 2,235.06 ZAR has been disputed by Samancor Chrome - ZZDELETE Jacques DIY.	03/24/25 11:41 AM
☐	New comment from Samancor Chrome - ZZDELETE Jacques DIY on Invoice INV 11Test	03/24/25 11:41 AM
☐	Invoice INV 12Test for 2,235.06 ZAR has been approved to pay by Samancor Chrome - ZZDELETE Jacques DIY.	03/24/25 11:35 AM

Notification Preferences

2 3 4 5

There is a message indicating an invoice was **Abandoned**, **Disputed**, **Approved** or a **Comment** was submitted. Kindly take note of these Notification Messages.